

U.S. Seafood Exports Top Growth Markets and Products

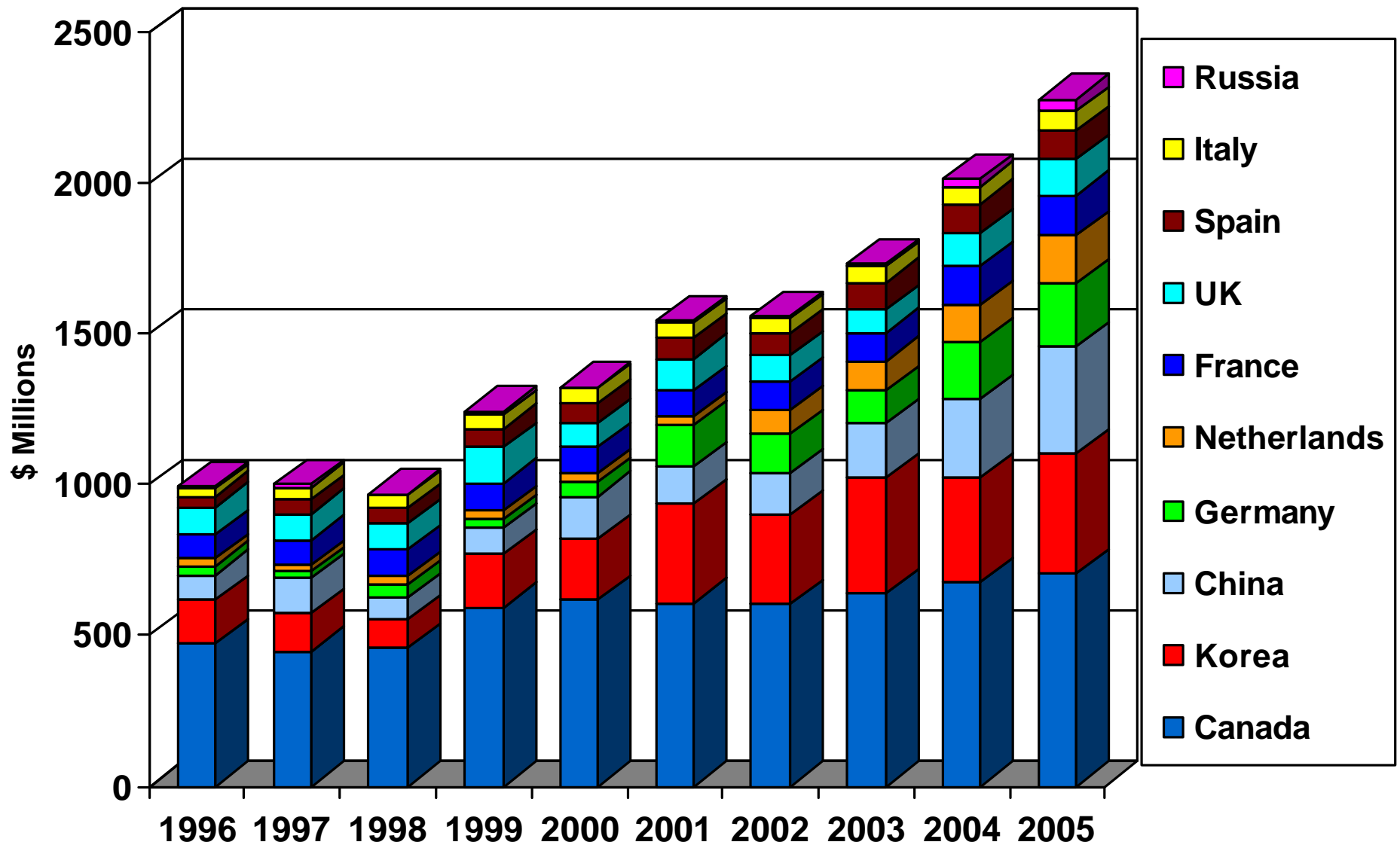
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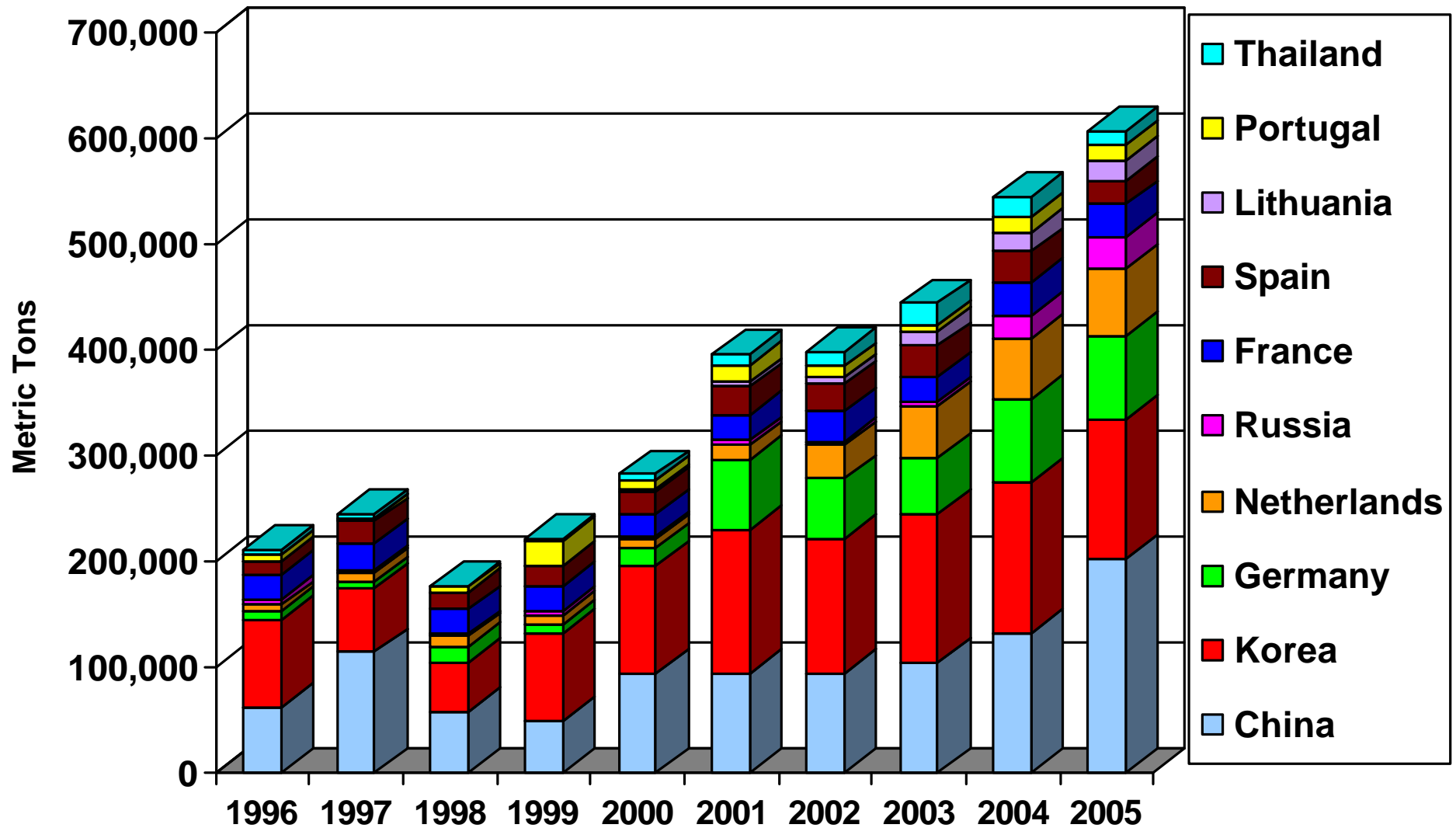
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Top 10 Growth Markets for U.S. Seafood by Value



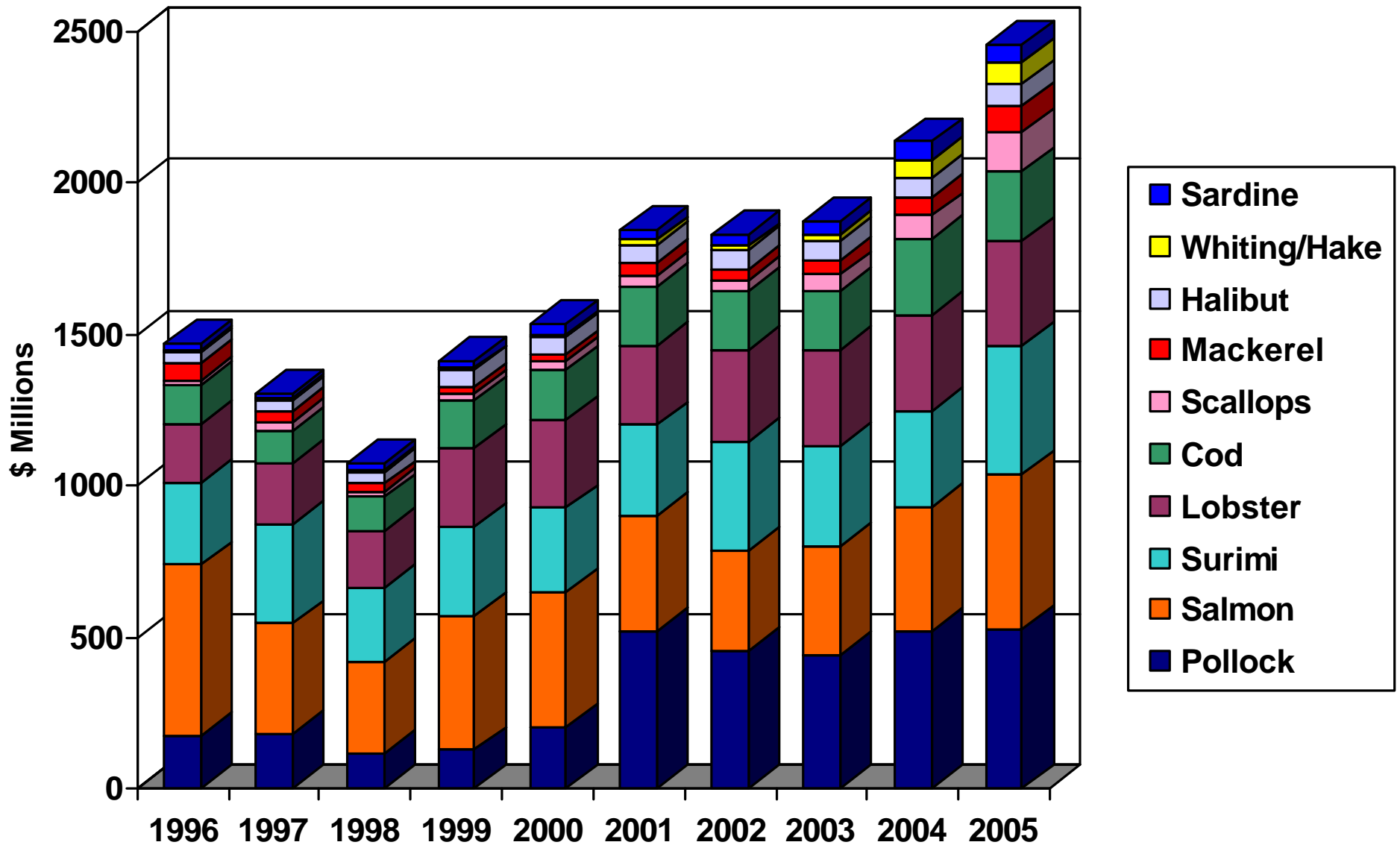
Top 10 Growth Markets for U.S. Seafood by Volume



Growth Markets – What's Behind the Numbers?

- Canada: large importer of premium products much of which is further processed and re-exported. Imports of high-value scallops are growing. Imports of lobster and halibut are increasing in value.
- Korea: increased sales of surimi and pollock
- China: large consumer and re-processor/exporter of seafood. Imports have increased for many species and products including salmon, cod, sole, crab, pollock, herring, fish meal, sardine, surimi and scallops.
- Germany: increased sales of pollock, surimi and salmon
- Netherlands: significant market and transshipment point for seafood, with growing imports of pollock, surimi, cod, salmon and scallops
- France: large importer of lobster and salmon, and a growing market for scallops, surimi and pollock
- United Kingdom: largest market for canned salmon, and a growing user of scallops, frozen Sockeye salmon and Coho salmon
- Spain: large importer of cod; growing market for lobster, surimi and whiting/hake
- Italy: growing market and largest European destination for lobster
- Russia: growing market for whiting/hake, frozen salmon and salmon roe
- Lithuania: growing importer of surimi and re-processor/exporter of surimi-base analogue seafood
- Portugal: large importer, consumer and re-processor/exporter of cod
- Thailand: growing importer and re-processor/exporter of salmon

Top 10 Growth Products for U.S. Seafood by Value



Growth Products – Where Are They Going?

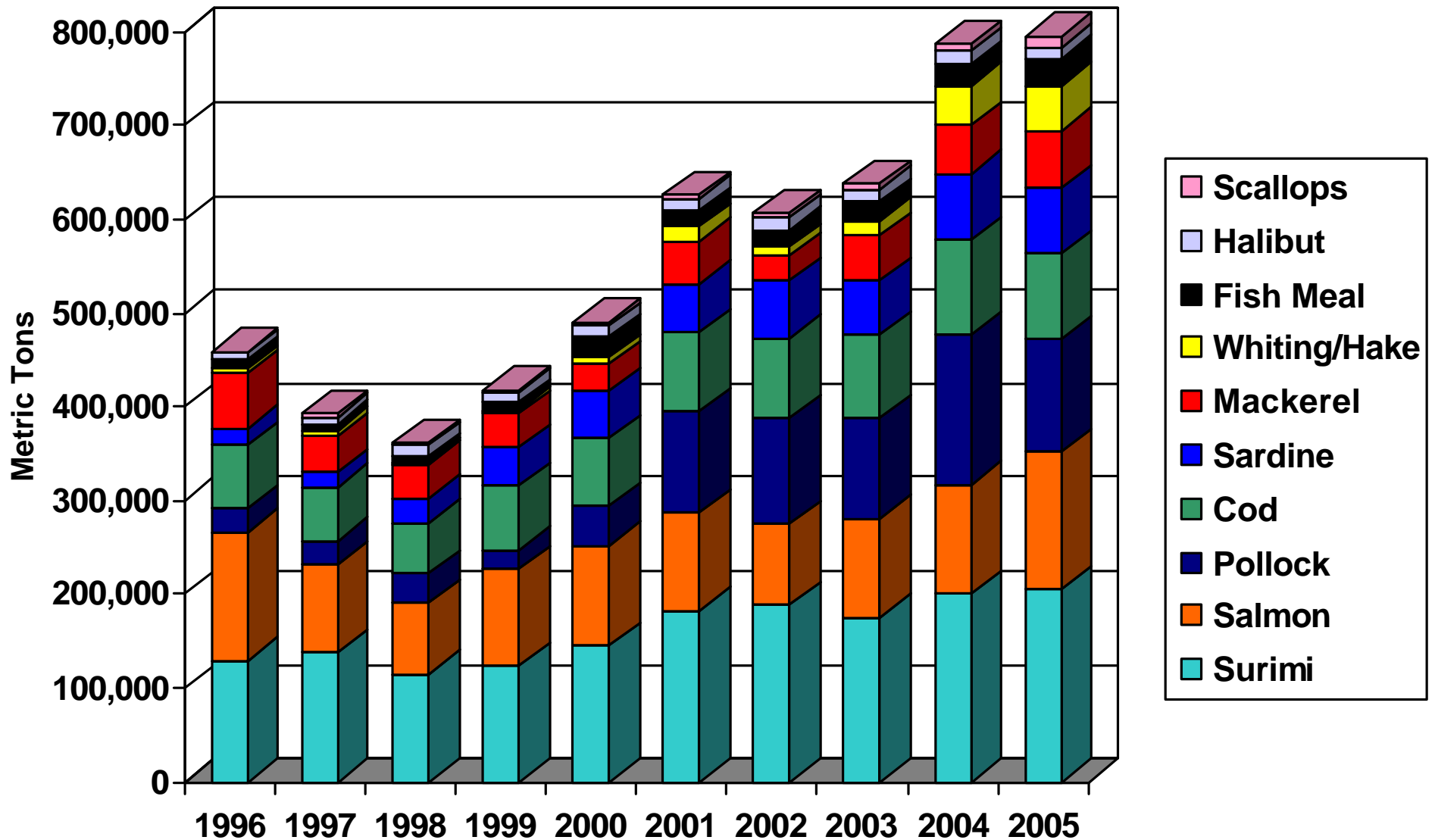
Exports by Regional Share (Value), 2005

	North America	European Union	Former Soviet Union	East Asia	Southeast Asia	All Other Regions
Pollock	1%	33%	*	65%	*	*
Salmon	13%	15%	3%	62%	5%	2%
Surimi	*	16%	*	83%	*	*
Lobster	49%	43%	*	6%	*	*
Cod	9%	33%	*	43%	2%	13%
Scallops	25%	54%	*	14%	4%	3%
Mackerel	3%	3%	6%	63%	3%	22%
Halibut	92%	2%	0%	6%	*	*
Whiting/Hake	*	44%	44%	7%	0%	5%
Sardine	1%	2%	2%	74%	2%	19%

See <http://www.fas.usda.gov/ustrade/ustlists/FASCntryGrp.asp?Ql=> for lists of countries in defined regions.

* indicates less than 1%.

Top 10 Growth Products for U.S. Seafood by Volume



Growth Products – Where Are They Going?

Exports by Regional Share (Volume), 2005

	North America	European Union	Former Soviet Union	East Asia	Southeast Asia	All Other Regions
Surimi	*	18%	*	81%	*	*
Salmon	12%	19%	4%	56%	6%	3%
Pollock	3%	63%	*	33%	*	*
Cod	8%	29%	*	49%	3%	11%
Sardine	1%	1%	2%	64%	1%	31%
Mackerel	3%	5%	6%	46%	3%	37%
Whiting/Hake	*	34%	55%	4%	0%	7%
Fish Meal	1%	*	5%	93%	*	*
Halibut	88%	3%	0%	9%	*	*
Scallops	26%	54%	*	13%	3%	4%